

Important Documents Folder Checklist

PERSONAL

- Birth certificate
- Social security card
- Passports and proof of citizenship
- Green card or proof of legal residency
- Copies of driver's license and ID's
- Diplomas
- Marriage / divorce certificates
- Child custody papers
- Adoption documents
- Life insurance policy (include your policy number and insurance company contact information)
- Student loans paperwork
- Death certificate of a deceased family member (you may need these for legal purposes)
- List of usernames and passwords for personal accounts
- Address book with a list of important contact's numbers and emails
- Family photos, letters and irreplaceable papers that you don't want to lose
- Funeral instructions

PETS

- Vet records including proof of vaccinations
- Current prescriptions and dosage
- Chip ID numbers

REAL ESTATE AND PERSONAL PROPERTY

- Proof of ownership of all property, such as mortgage documents
- Vehicle / RV / boat titles and registration
- Photos and videos of your home (including the garage), and the inside of your RV and boat.
- Home remodeling / building invoices and proof of payment
- Appraisal documents / receipts of valuable items you own such as collectibles, antiques, artwork and jewelry
- Lease and rental contracts
- Copies of the bills mailed to your home, such as utilities, cable, WiFi and phone bills
- Insurance policies, such as homeowners / renters / vehicle / boat / insurance specific to natural disasters (include your policy number and insurance company contact information)

ESTATE PLANNING

- Wills
- Trusts
- Powers of attorneys

BUSINESS

- Employment and business contracts
- Backup of computer files and business software (including accounting)
- Business tax and payroll returns
- List of usernames and passwords for business accounts
- Proof of employment benefits

MEDICAL

- Vaccination records
- Records of current prescription medications and dosage
- Health insurance (include your policy number and insurance company contact information)
- Dental records, if possible
- Fingerprint records, if possible

FINANCIAL

- Copies (front and back) of credit and debit cards
- List of all bank documents: including checking, savings, brokerage and 401(k) retirement account information
- Records and proof of financial investments
- Stocks and bonds certificates

GOVERNMENT

- State and federal tax returns for the past 3-7 filing years.
- Proof of government benefits, including disability and social security
- Military documents and discharge papers (including DD214 and other separation papers)